Headquarters U. S. Air Force

Integrity - Service - Excellence

Acquisition Strategy Panel Mandatory Template

SYSTEM PROGRAM MANAGER:
PROGRAM MANAGER:
CONTRACTING OFFICER:

Updated July 2008

Please refer to the notes section for valuable

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Template

- This template is designed to provide the key topics necessary to address for a successful Acquisition Strategy Panel (ASP).
- The briefing should address every Template topic. For those topics that are not applicable indicate n/a with a brief explanation.
- The basic goal is to provide the decision maker an understanding of a well thought out strategy that considered all the important issues
- Those programs that have OSD involvement need to ensure the PM addresses all of the potential areas that the OSD decision makers and staff might want covered when discussing a particular program strategy
  - See the Defense Acquisition Guidebook, particularly Sect. 2.3
  - See LCMP Guide
- Information is contained in the notes section to help you in preparation of the briefing. The SAF/ACE and local ACEs are available to assist (see Notes section).
- Sample charts are provided at the end of the template and are optional.

ASP Discussion Items

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	Addressed?	If not, why?/comments
Program overview/description		
Identify Program Goals/Objectives		✓
Linkage to other programs	✓	
Capabilities/KPPs/Key acq. Obj.	✓	
Expectations Management Agreement	✓	
Funding/POE	✓	
Confidence level	✓	
POE/CAIG Estimate	✓	
Risk Assessment		✓
Technology Readiness/Transition	N/A	Production contract
Industrial Base Considerations	✓	
Acquisition Strategy		
Proposed	✓	
Alternative Strategies Considered		N/A only one viable strategy
Program Schedule		
Road to ASP Schedule		✓
Major Program Schedule	(Critical Path)	✓
12 month schedule	✓	
Systems Engineering	✓	
Open Technology (MOSA-OTD)	✓	
Test and Evaluation	✓	

ASP Discussion Items

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	Addressed?	If not, why?/comments
~~Product Support (LCM)~~	✓	
SORAP	✓	
ATS	✓	
Data & Data Rights	✓	
Market Research		✓
International Cooperation	✓	
Small Business	✓	
Business/Contract Strategy		✓
Deviations, Waivers, Delegations		N/A None requested
Source selection	✓	
Evaluation Criteria (Sect L&M)		✓
Contract Type	✓	
Special T&Cs		✓
Contract Incentives	✓	
How will you control costs?		✓
Manpower/Personnel	✓	
Org structure		✓
Resources	✓	
Experience	✓	
Manpower ramp up/down plan	✓	

ASP Discussion Items

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Other topics	Addressed?	If not, why?/comments
Envir & Manuft/Quality Engineering	✓	
Interoperability	✓	
Information Assurance	✓	
Information Technology	✓	
Research/Technology Protection	✓	
Protection-Critical Progr. Information	✓	
Anti-Tamper	✓	
Human Systems Integration	✓	
Environment, Safety, Occupational Health	✓	
Military Flight Operations QA	n/a	ground equipment
Spectrum Management/Supportability	✓	
Integrated Digital Environment Mgt	✓	in back-up
Gov't Furnished Equipment/Property	n/a	none provided
Modeling and Simulation	✓	
Clinger Cohen Act Certification (CCA)	✓	
Corrosion Control	✓	
Insensitive Munitions	✓	
Unique Identifiers	✓	in back-up
Trusted Foundry	✓	

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Outline

- Bottom Line Up Front (BLUF)
- Program Structure (Overview)
- Factors shaping strategy
  - Capability Needs/EMA
  - Program Cost Est./Funding
  - Risk Management
  - Technology Transition
  - Industrial Base Considerations
- Acquisition Strategy
  - Proposed
  - Alternative Strategies Considered
- Program Schedule
- Systems Engineering
- Product Support Strategy
- Test and Evaluation
- Business Considerations
  - Market Research
  - Sole Source vs. Competition
    - Source Selection
  - Contract Parameters
  - Contract Incentives
  - Small Business
  - Schedule To Contract Award
- Program Office
- Additional Acquisition Topics
  - Status of MS Documentation
  - What worries me?
- Recommendations
- Chart Samples

Bottom Line Up Front
(Decisions Requested & Key program Information)

- **Decisions you are requesting**
  - **Approve Acquisition Strategy**
  - **Approve Applicable delegations**
- **Major Issues**
  - **List “show stoppers”**
  - **What are your concerns**
    - **Losing Funding**

Don’t wait to the end to bring up the negatives!

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Program Structure Overview

- **Top Level Background**
  - **Identify *(See following quad chart as a potential sample*)**
- **Identify linkage to other programs**
- **Explain unique organizational structures or relationships**
  - **Internal/External Stakeholders**
- **Identify OSD involvement**
- **MS Decision Points and Acquisition Phases**
- **Identify Program Goals and Objectives**

Program X ("Strategy on a page")

Requirements/Direction

Using Organization(s) -

Capabilities Document –

PMD

FMS

Moderate Technical Risk

Decision Authority

MDA –

PEO Program – AFPEO/XX

ACAT Level –

SSA –

Delegations: In work

- e.g.., SSA, ASP Chair, LCMP

Financial Data

Est. Contract Value (Pre-SDD) -

Est. Total Program (qty) - $

Fund Type (Pre-SDD) – e.g.., 3600

New Start (Congressional) –

Strategy

Competitive or sole source

Incremental

Contract Type –

Estimated Contract Award –

Schedule MS A –

MS B –

IOC –

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Factors Shaping Strategy

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Capability Needs To Be Briefed by the Warfighter!

- **Discuss the capability required.**
  - **Macro level – ICD, CDD, CPD signed/dated**
  - **Critical capability highlights -Mandatory Key Performance Parameters (KPPs) and Key System Attribute (KSAs)**
  - **Acquisition Approach (Evolutionary?)**
- **Explain how you know that this is realistically achievable within the time and funding provided.**
  - **Have the requirements been scrubbed and are they evaluatable in a source selection? (to be briefed by the PM)**
- **Discuss what collaboration has been accomplished in developing these capabilities.**
- **How has industry been involved?**
  - **Identify requirements Industry has indicated they can't meet**
- **What are your plans for future capabilities?**
  - **ICD—CDD; CDD—CDD (next Increment); CDD-CPD**

Expectations Management
Status of Agreement

- **Explain your signed Expectation Management Agreement (EMA)**
  - **EMD date**
  - **Demonstrate (money=content=schedule)**
  - **Include the “nice to haves”**
- **What change process is in place?**
  - **Who authorizes changes?**
  - **Update w/ PMD 45 days after President’s Budget submission**
  - **Update out of cycle with major perturbations**
- **If you do not have an EMA, explain your plan to get one including any potential obstacles**
- **Program Management Agreement**
  - **Identify PM Tenure Dates** **(or in manpower section)**

Program Cost Estimate/Funding

- Identify your cost estimate
  - Identify the Confidence level of the estimate (50-90%)
- Identify if this is a Program Office or Service Cost Estimate
- Address any AFCAA/OSD CAIG issues that may exist
- Specifically address funding shortfalls
  - Explain your budget plans
  - RDT&E plan for executing obligation and expenditure
  - Explain what MAJCOM commitment exists to cover shortfall as applicable (EMA)
- Provide an overall funding chart
  - Required by FY/color
  - Actual by FY/color

Mandatory

Program Office Estimate (POE)

Investment Program Funding											
($ in Millions / Then Year)	Prior	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY08-14	To Comp	Prog Total
RDT&E											
Prior $ (BES w/PB05 Cong Marks)									0		
Current $ (PB)									0		
Delta $ (Current - Prior)	0	0	0	0	0	0	0	0	0		
Required Block 0									0		0
Required Block 10									0		0
Total Required $	0	0	0	0	0	0	0	0	0	0	0
Delta $ (Current - Required)	0	0	0	0	0	0	0	0	0	0	0
PROCUREMENT											
Prior $ (BES w/PB05 Cong Marks)									0		
Current $ (PB)									0		0
Delta $ (Current - Prior)	0	0	0	0	0	0	0	0	0		
Required $									0		0
Delta $ (Current - Required)	0	0	0	0	0	0	0	0	0	0	0
O&M											
Prior $ (BES w/PB05 Cong Marks)									0		
Current $ (PB)									0		0
Delta $ (Current - Prior)	0	0	0	0	0	0	0	0	0		
Required $									0		0
Delta $ (Current - Required)	0	0	0	0	0	0	0	0	0	0	0
Milcon											
Prior $ (BES w/PB05 Cong Marks)									0		
Current $ (PB)									0		0
Delta $ (Current - Prior)	0	0	0	0	0	0	0	0	0		
Required $									0		0
Delta $ (Current - Required)	0	0	0	0	0	0	0	0	0	0	0
TOTAL											
Prior $ (BES w/PB05 Cong Marks)	0	0	0	0	0	0	0	0	0		
Current $ (PB)	0	0	0	0	0	0	0	0	0	0	0
Delta $ (Current - Prior)	0	0	0	0	0	0	0	0	0		
Required $											0
Delta $ (Current - Required)	0	0	0	0	0	0	0	0	0	0	0
QUANTITIES											
Required Qty									0		0
Required Installations									0		0

Risk Management

Risk Assessment with Mitigation

- Identify the key Programmatic Risks—Cost, Funding, Schedule, Performance (Technology, Software, Manufacturing), Industrial Base, Manufacturing, Political?
  - What are they? Why do you think they are the only ones?
  - How are you going to address them?
  - In the following charts, plan to use various mitigation strategies to address them
- What is the technical maturity level of your system? Is this the appropriate strategy given the technical maturity level?
  - Describe your top technical challenges
    - Who assessed the technology levels? Labs?
    - What are they, why do you think they are the only ones?
    - How are you going to address them?
- Provide Risk Matrix
- See Section 4.2 of DoD Guidebook

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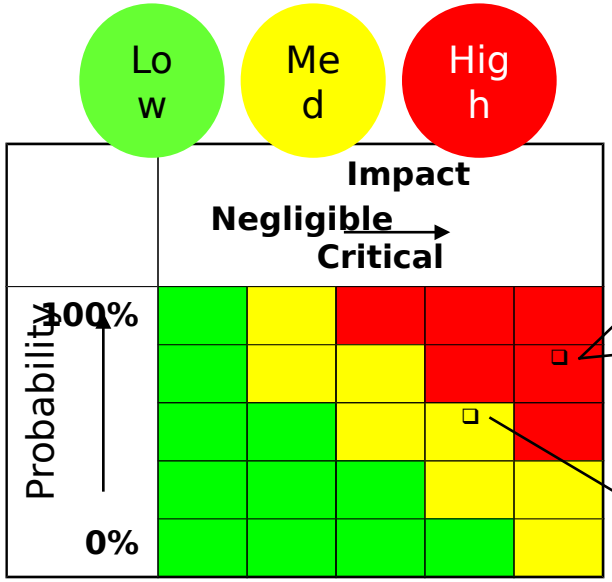
Program Risks



Risk Areas—Technical, Cost, Schedule, Logistics, Integration, etc

Mitigation Plan

Risk Areas (Increment 1)
Technology Issue

Mitigation Plan

Risk Areas (Increment II)

Mitigation Plan

risk workshop completed – Date/By Whom

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Risk/Cost

(Schedule, technical, or software)

Requirement: Develop/Procure xyz system		
Risk Statement: Eg., Cost proposal exceeds budget		
Impact: Address impact of risk		
Probability: 4	**Consequence: Serious**	**Risk Rating: High (Red)**
Risk Management: Address mitigation approach **(Describe risk handling plan, milestones and risk closure criteria)**		
Post Risk Management Rating: Probability 1, Serious, Moderate (GREEN)		

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Technology Transition (As Applicable)

- **Explain how you have assessed the technology available in development to ensure rapid insertion**
  - **Technology Readiness Level: entire technology aspect**
  - **Status of Technology Readiness Assessment**
  - **Fold in to the program—dovetail with contractor efforts**
- **Explain what plans you have for keeping track of new developments within the laboratories/battle labs etc.**
- **Address areas of technology the program is going to support and any MOAs or informal agreements that you have with Laboratories (i.e., AFRL, NRL, LLNL, etc)**

Mandatory Technology Readiness

Technology	TRL	Incr 1	Incr 2
	9	X	
	6		X
	9	X	
	8	X	
	9	X	
	9	X	
	7		X
	5		X
	6		X
	6		X
	9	X	
	6	X	
	9	X	
	8	X	
	8	X	

Technology Readiness Levels (TRL)

9. Actual system "flight proven" through successful mission operations

8. Actual system completed and "flight qualified" through test and demo

7. System prototype demonstration in a operational environment

6. System/subsystem model or prototype demonstration in a relevant environment

5. Component and/or breadboard validation in relevant environment

4. Component and/or breadboard validation in laboratory environment

3. Analytical and experimental critical function and/or characteristic proof-of-concept

2. Technology concept and/or

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Industrial Base Capability

- **Industrial Capability**
  - **Address industry's capability to design, develop, produce, support (product technology obsolescence, replacement of limited-life items, regeneration options for unique manufacturing processes, and conversion to performance specifications at the subsystems, component, and spares levels) , and, if appropriate, restart an acquisition program.** (see notes section)
  - **Address the effort performed as part of your analysis to determine the need for government action necessary to ensure a robust US Industrial and Technical base**
    - **Are new industrial base capabilities required?**
    - **US or off-shore manufacturing?**
    - **Diminishing Manufacturing Sources (DMS)**
- **Address the possibility for cooperative research and development opportunities**

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Acquisition Strategy

- **The Acquisition Strategy defines the approach the program will use to achieve full capability: either evolutionary or single step; it should include a brief rationale to justify the choice. (See notes for additional information)**
- **Prototyping and Competition (See 19 Sep 07 USD AT&L) and notes below**

Proposed Acquisition Strategy

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Alternative Strategies Considered

Program Schedule

MS Decisions and Key Program Events

- **Event driven milestone chart**
  - **Include major milestones (Decision Points/Acquisition Phases)**
    - **See sample charts**
    - **Major events required to make an award**
    - **OIPT or ITAB/DAB**
    - **Key documents needing approval**
- **Provide the following schedule charts:**
  - **How we got here**
  - **Long term program Schedule**
    - **Critical Path chart**
  - **12 Month schedule chart**

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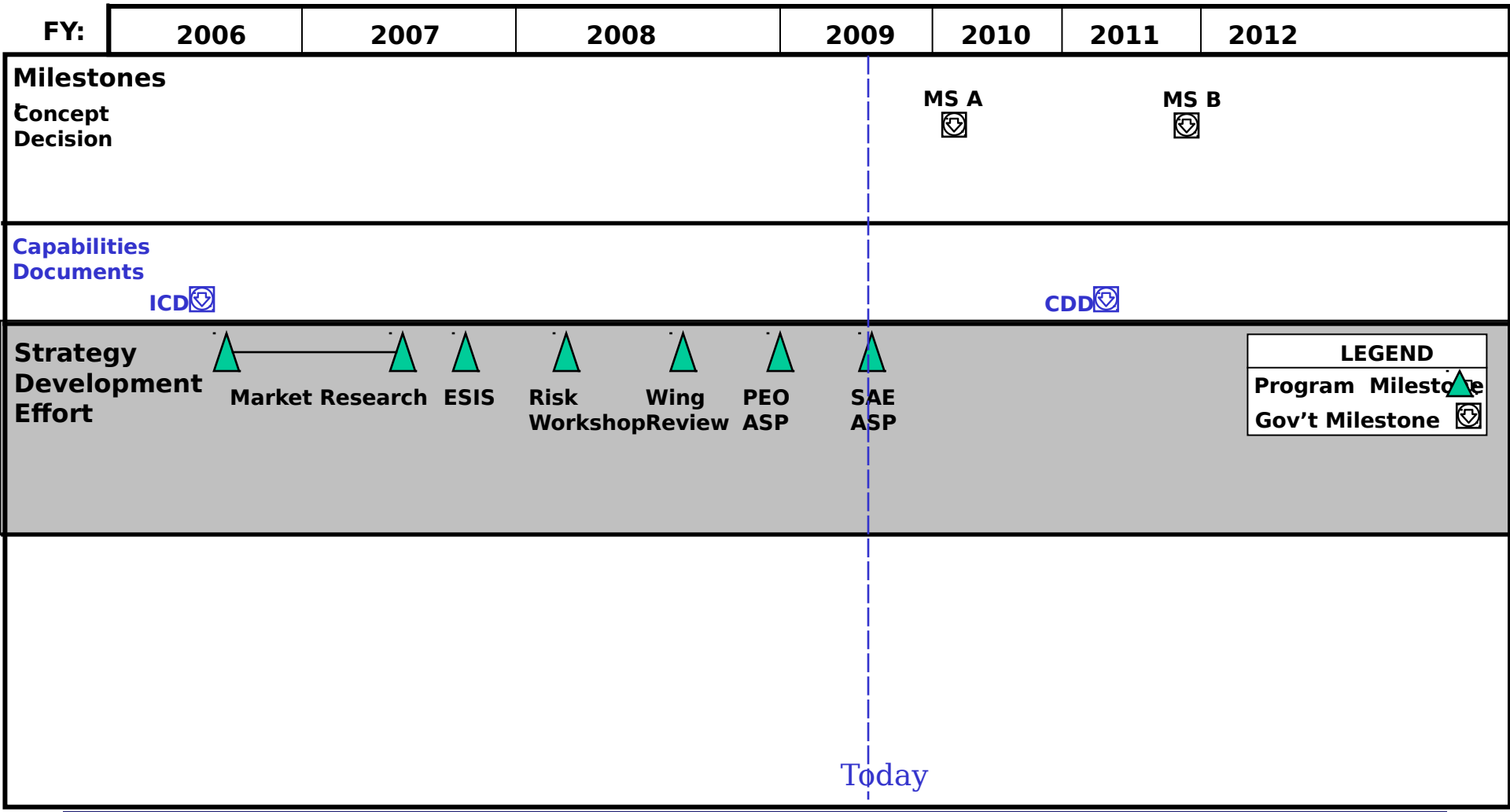
Program X Schedule
How we got to this point!



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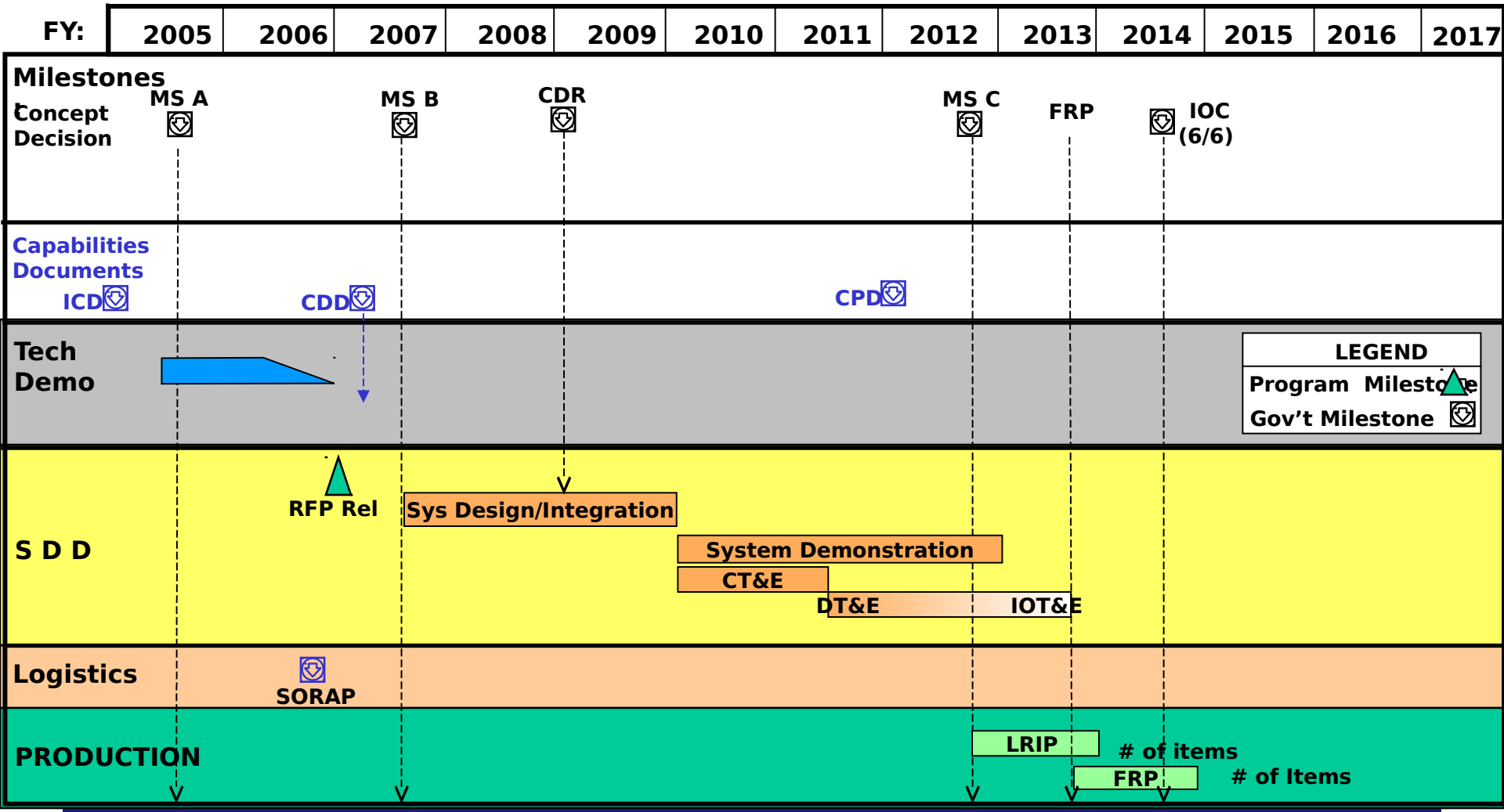
Mandatory for single Increment

Program X Schedule Single Increment



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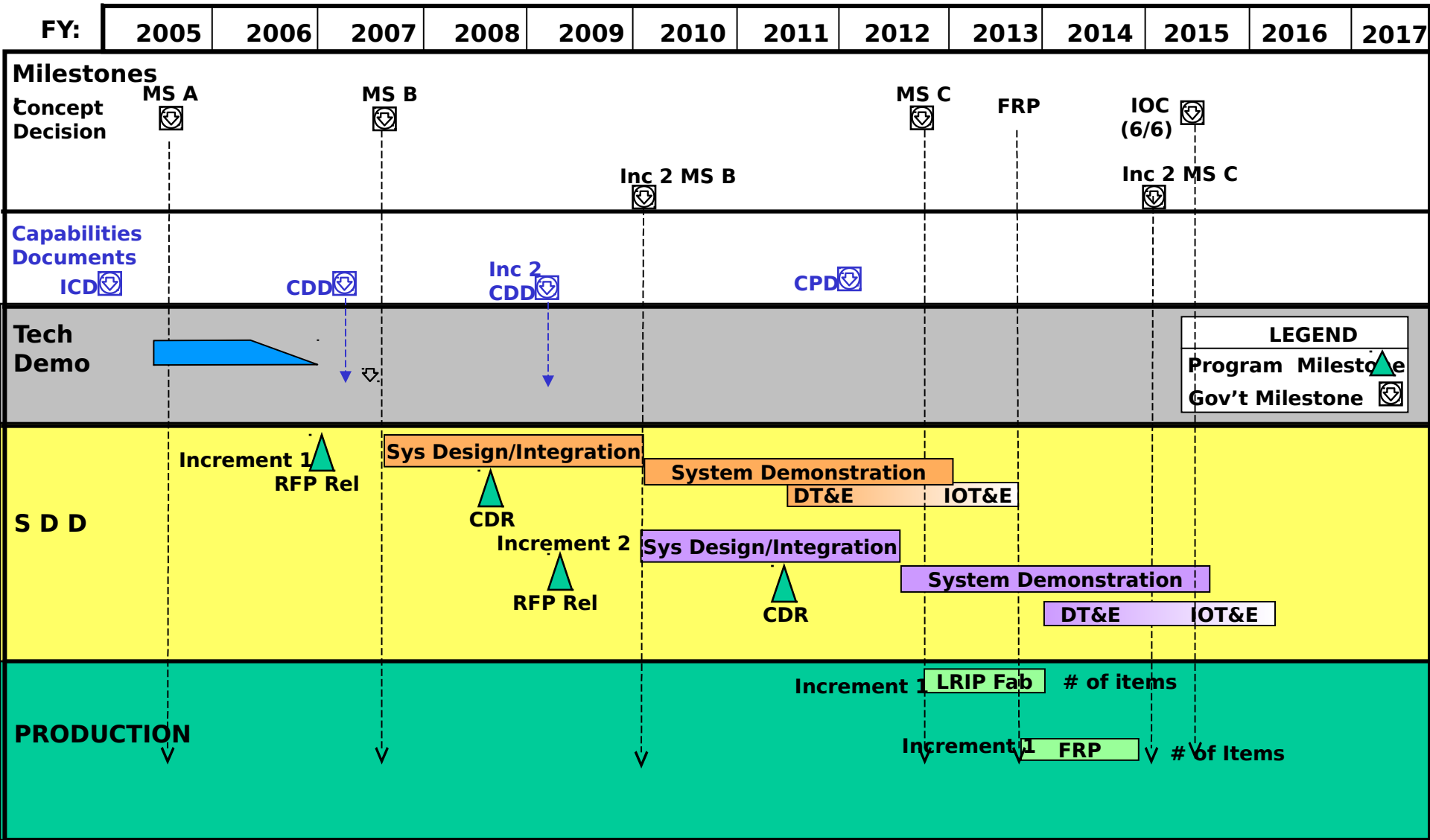
Mandatory for Multiple Increments

Program X Schedule Multiple Increments



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Sample Critical Path Schedule In back-up charts

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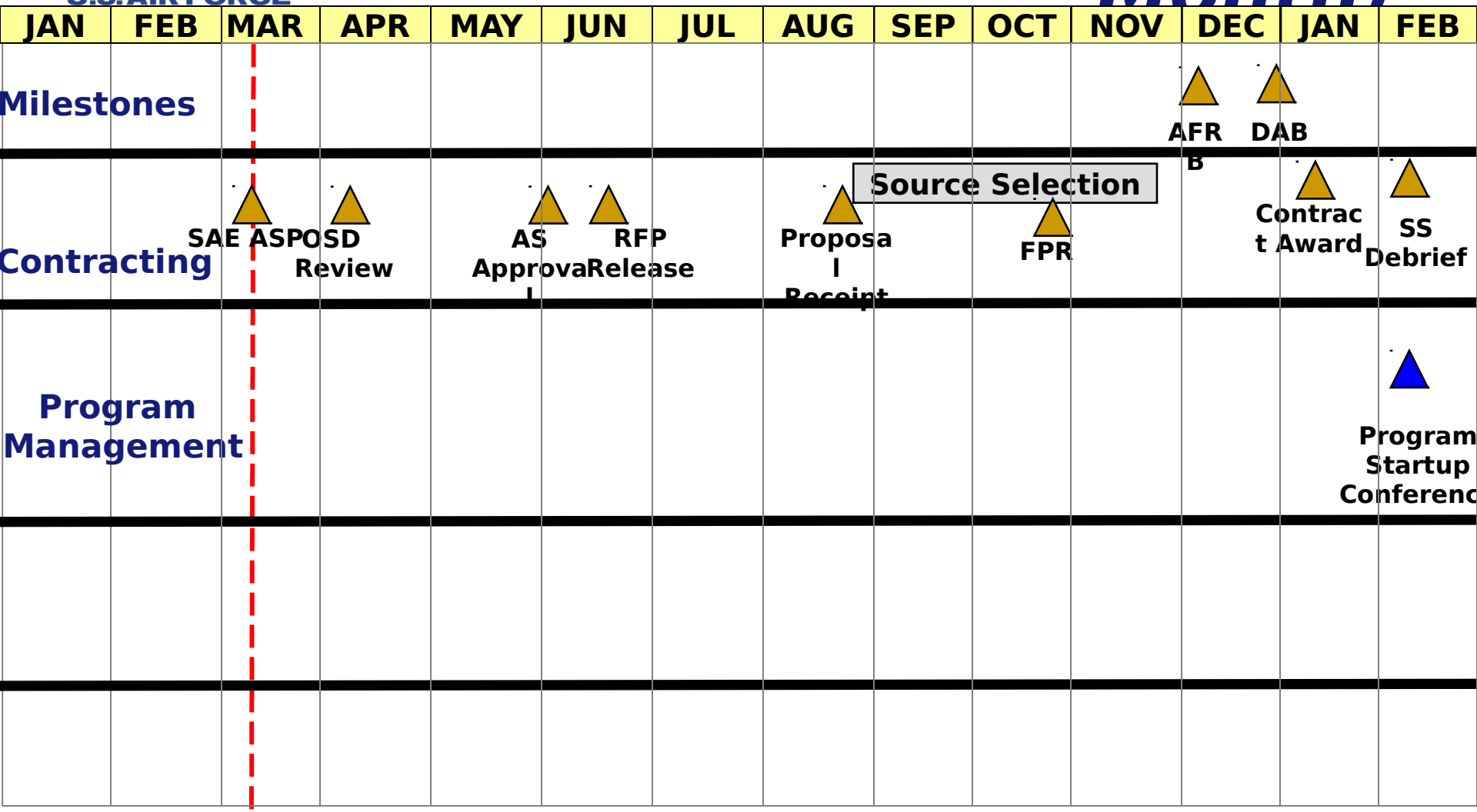
Mandatory Milestone Schedule (12 Month)



Systems Engineering (SE)

- Describe how your overall SE approach drives and supports the acquisition strategy across the acquisition life cycle
- Show linkage to acquisition life cycle activities such as:
  - Requirements planning
  - Technology development/maturation and transition
  - Risk management
  - Integration into/with other systems in SoS or FoS environment
  - Technical baseline management
  - Technical reviews (including Gov't Peer Reviews)
- Describe key components of the RFP and contract
  - Identify key RFP requirements and selection criteria to evaluate bidder's approach to SE and a robust design *(or address in the source selection part of brief)*
  - Identify key contractual provisions to ensure contractor implements proposed approach

See notes – use multiple slides as

Systems Engineering (SE)

- **Open Technology Development Considerations**
  - **Modular Open Systems Approach / Open Architecture**
    - **Modular system and design disclosure: Have you identified key interfaces, data elements and sub-systems (incl. S/W) which should be open / common / standard?**
    - **Is there a reference implementation architecture and set of default standards for your domain of operation? Applicable?**
  - **Open Source Software Methods / Software Reuse**
    - **Contracting approach for S/W licensing and Intellectual Property (IP) rights**
    - **Application Programming Interface (API) disclosure / delivery**

See notes – use multiple slides as needed

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Systems Engineering Cont…

- **Describe your approach to translating Capability documents to systems specification. If available provide a capability cross correlation matrix that indicates the KPPs, KSAs, the translation of those requirements into the systems specification (sample in backup charts).**

- **Discuss status of initial manufacturing concepts and their implementation (pre-MS B/C)? What is the status of LRIP manufacturing capabilities and ability to ramp up to full rate production?**
  - **Status of Production Readiness Review**
  - **What are the critical manufacturing elements?**

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Product Support Strategy

- **Source Of Repair Decision (See footnotes)**
  - **Status of your Source of Repair Assignment Process**
  - **Organic and Contractor Capability/Capacity**
  - **50/50 Assessment**
  - **Source of Repair Assignment Process (SORAP) Completion Date (see notes)**
  - **Partnership Opportunities for Repair**
  - **Core vs non-core impacts to strategy**
- **Source of Supply Decision**
  - **Organic and Contractor Capability/Capacity**
- **Diminishing Manufacturing Sources (DMS) Considerations**
- **Reliability, Maintainability, Availability (if not addressed elsewhere)**
- **Evolutionary Acquisition effects on Supportability**
- **Berry Amendment implementation in sustainment**

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Product Support Strategy

- **Automatic Test Systems**
  - **Discuss approach and schedule**
  - **Will waiver be necessary?**
- **Performance Based Logistics**
  - **How has performance based logistics been factored into your overall strategy?**
    - **Have you accomplished a cost benefit analysis incorporating OSD policy?**
  - **Address types of measure used for PBL (e.g, Flying hours, MC rates, availability, etc.)**
  - **Address impact on user's flexibility to fund PBL**
- **Discuss approach to acquiring engineering data and data rights (See notes from the FY07 NDAA)**
- **Are you using the Acquisition Sustainment toolkit? See footnote for link**

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Test and Evaluation

- **Describe the T&E Strategy and how it supports the acquisition and requirements strategies (See notes).**
- **Identify issues regarding availability of production representative test articles, test facilities, Systems Integration Labs, Collaborative Development Environments**
  - **Also describe capability shortfalls of the test ranges.**
- **Have you developed your TEMP?**
  - **Do you have the time, budget, and assets required for test**
  - **Are the Critical Operational Issues (COIs) linked to Critical Technical Parameters (CTP) and Measures of Effectiveness (MOE)?**
- **Is DOT&E involved? If so, what is their position regarding integrated testing economies**
  - **What specific challenges are addressed through your test strategy?**
  - **How have you incorporated Modeling and Simulation into your strategy and what challenge does this address**

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Business Considerations

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Market Research

- Sources Sought Synopsis Results
- Industry Days Held
  - Industry Feedback on requirements, contract type, incentives, etc
- Prospective Sources
  - Qualified SB Sources?
    - Consideration of SB program set-asides or partial set asides; i.e., SB, 8a, SDVOSB, HUBZone.
  - Consolidation/Bundling Issues?
- Potential for International Cooperation Program
- Potential for FMS
  - ITAR issues

Sole Source vs. Competitive

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- **Sole Source Topics**
  - **Authority**
  - **Future Competition**

- **Competitive Topics**
  - **Source Selection Procedures**
  - **Source Selection Organization**
    - **Address the Source Selection experience of the team**
  - **Evaluation Criteria with Weighting**
    - **Tied to Risks and Significant Discriminators**
    - **See Sample Matrix chart to be included with Briefing**
      - **Be prepared to Discuss in detail**
  - **Selection criteria to address Section 801 certification requirements for MDAP programs at MS B (See notes)**

Note: FOR OFFICIAL USE ONLY once Section L&M information

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Source Selection

Sample Cross Reference Matrix

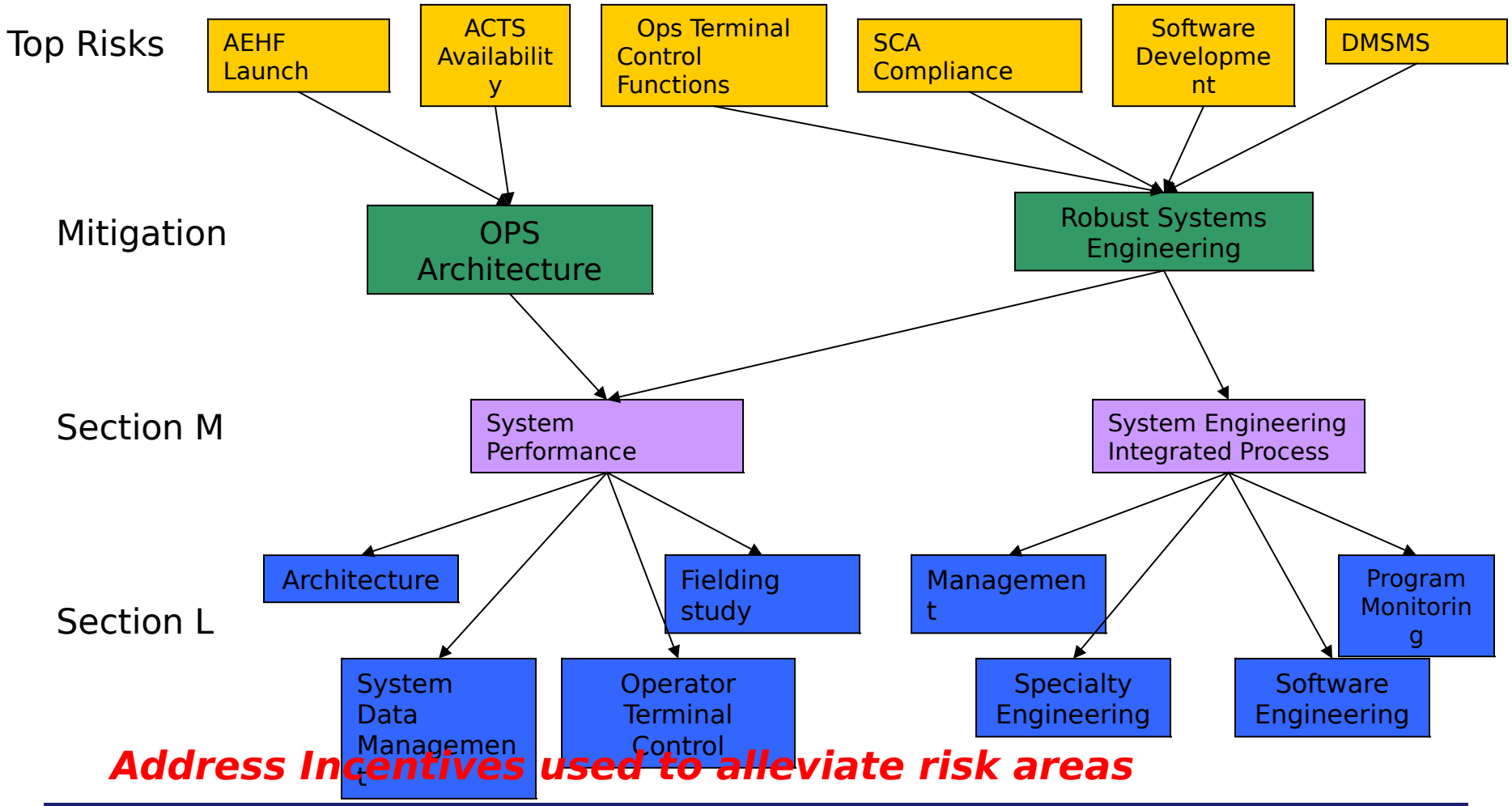
Sow	Risk	Sec L	Sec M	Proposal
1.1.2	Mod	2.2.1	4.2.1	
1.3.2	High	2.3.2	4.2.2	
1.4.2	Mod	2.4.1	4.4.1	

This or the next chart is Mandatory

How do you plan to measure and incentivize contractor's perfor

Mandatory

Source Selection Evaluation Criteria Selection



Address Incentives used to alleviate risk areas

I n This or the previous chart is Mandatory

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Contract Parameters

- **Commercial vs. Noncommercial**
  - **Rationale – Commercial Item Determination (CID)**
  - **Industrial base and foreign competitors (if not addressed somewhere else)**
- **Contract Type (See footnote for development programs)**
  - **Need to discuss the rationale for your contract type**
    - **What measures are in place to control contract costs?**
- **Contract Structure**
- **Performance Based**
- **Special Terms and Conditions**
  - **E.g.s, Organizational Conflict of Interest (OCI), Pricing Matrix**
  - **Berry Amendment**
- **Subcontractor Management**
  - **Make or Buy considerations**

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Contract Incentives

- **Discuss why an Incentive is needed**
  - **What are the key program risks and how can incentives help to mitigate risks and improve probability of success? (See notes below)**
- **What Objective Incentives were considered and why (See FAR Subpart 16.4 -- Incentive Contracts)**
- **Will an Incentive Fee be used?**
  - **What type (Is there adequate funding to cover it?)**
  - **How will incentive control costs?**
- **Award Fee**
  - **How is award fees linked to the acquisition outcomes—cost, schedule and performance?**
    - **How is award fee tied to specific challenges & delivered capability versus just "effort"**
    - **What are the specific areas you want to incentivize?**
      - **Objective/Subjective criteria**
      - **How do these track to risk areas?**
  - **How do you know this incentive is adequate to drive**

Reminder –no award fee can be paid for performance not meeting contract

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Contract Incentives

- **Award Fee Cont…**
  - **How will the contractor's performance be judged?**
  - **How will award fee periods be structured?**
    - Will there be a base fee?
    - Will award fee be back loaded (to ensure enough money at end of contract in case schedule slips)?
    - Do you plan to use rollover? Why? What specifically do you plan to use rollover for?
  - **Who is the Fee Determining Official (FDO)?**
    - Is that the appropriate level?
- **Are there negative incentives for overrun or poor performance?**

Reminder—award fee must be earned--Scoring starts at

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Small Business

- **For companies who are not in the Comprehensive Subcontracting Plan Test Program**
  - **Describe your approach for incorporating SB/SDB business subcontracting goals into your overall acquisition strategy**
    - Remember the Air Force's objective to maximize subcontract awards to small business
    - Discuss how you determined the appropriate SB/SDB subcontracting goals
      - **Use factual data from your market research**
      - **Include a review of potential offerors' subcontracting performance at the business unit sector – explain the results**
      - **Explain how your analysis enabled you to set the optimum subcontracting range**
  - **Identify the SB/SDB subcontracting goals**
    - Express the goals as a % of total contract value, not % of subcontracted amt.
    - Don't rely on government specified % goals – use maximum practical % based on your market research and your acquisition
  - **Describe how SB/SDB subcontracting plans will be evaluated**
    - Discuss how you determined this evaluation approach to be appropriate
      - **Use factual data from your market research**
      - **Subcontracting performance at the business unit sector**
    - Explain how this evaluation will be addressed (Section L and M)
- **Comprehensive Subcontracting Plan Test Program approved by Congress**
  - Submittals from contractors participating in this program will be evaluated against their corporate commitment (see Notes)

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SB Cont…

- **Identify planned contract incentives to encourage aggressive S/B subcontracting (except for those contractors involved in the Comprehensive Subcontracting Plan Test Program)**
  - FAR clause 52.219-10, “Incentive Contracting Program”
  - Award fee
    - Assess whether contractor achieves goals (e.g..)
      - **Satisfactory: meets goals**
      - **Above satisfactory: exceeds goals**
- **Discuss your plan for post-award monitoring, such as**
  - Contracting Officer review of SF 294 reports/DCMA Forms 640
  - Actions that might be taken if contractor not meeting goals in Plan
  - Measuring performance and documenting same in Contract Performance Assessment Reports
  - Consider requiring CDRL for Small Business participation
  - Consider Liquidated Damages

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Schedule to Contract Award

MARKET RESEARCH / RFI SYNOPSIS

ACQUISITION STRATEGY PANEL

J&A/ACQUISITION PLAN or LCMP (or ASR) APPROVAL

DRAFT RFP RELEASE

FEDBIZOPS SYNOPSIS OF FORMAL RFP

PRESOLICITATION CONFERENCE (if Comp)

RFP RELEASE

PREPROPOSAL CONFERENCE (if Comp)

PROPOSALS RECEIVED

FACT FINDING/DISCUSSIONS

COMPETITIVE RANGE BRIEF (if Comp)

FINAL PROPOSAL REVISIONS/DISCUSSIONS

CONGRESSIONAL NOTIFICATION

CONTRACT AWARD (see footnote)

DEBRIEFINGS (if Comp/if requested)

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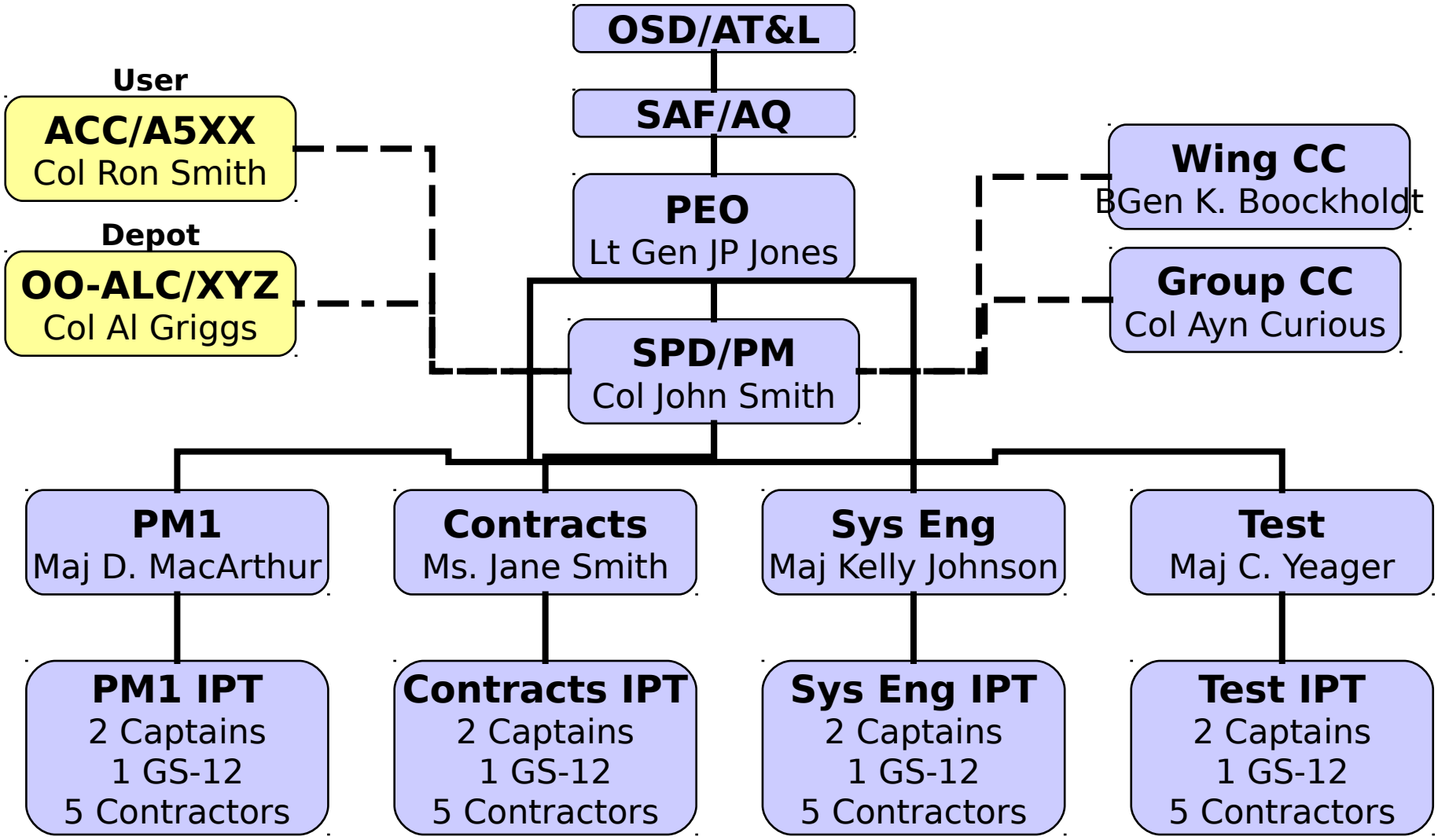
Program Office
Organization, Experience and ~~Manpower~~

- **Provide Organizational Structure (Org Chart)**
- **Resources**
  - **Address Critical manpower positions / program office manning & facilities**
    - **Program Office Staffing and Support Contractor Resources Available to PM**
      - Identify technical authority/chief engineer
      - Identify any shortage of personnel
  - **Identify current DAWIA (APDP) certification levels for all key government personnel (SPMs, PMs, etc)**
- **Integrated Product Teams (IPTs)**
- **PMA tenure agreement (on in EMA section)**

Mandatory

Program Org Chart



Program Office Acquisition Certifications

- **SPD/PM: Col John Smith** (Total Acq Exp = XX mos / x mos as PM)
  - Level III: Program Management
  - Level II: Test, SPRDE
- **PM1: Maj D MacArthur**
  - Level II: Program Management
  - Level I: SPRDE
- **PCO: Ms. Jane Smith**
  - Level III: Contracting
  - Level I: Program Management
- **SPO Personnel**
  - Military: 20
  - Civilians: 10
  - Contractors: 20
  - Critical shortage of Systems Engineering and Test

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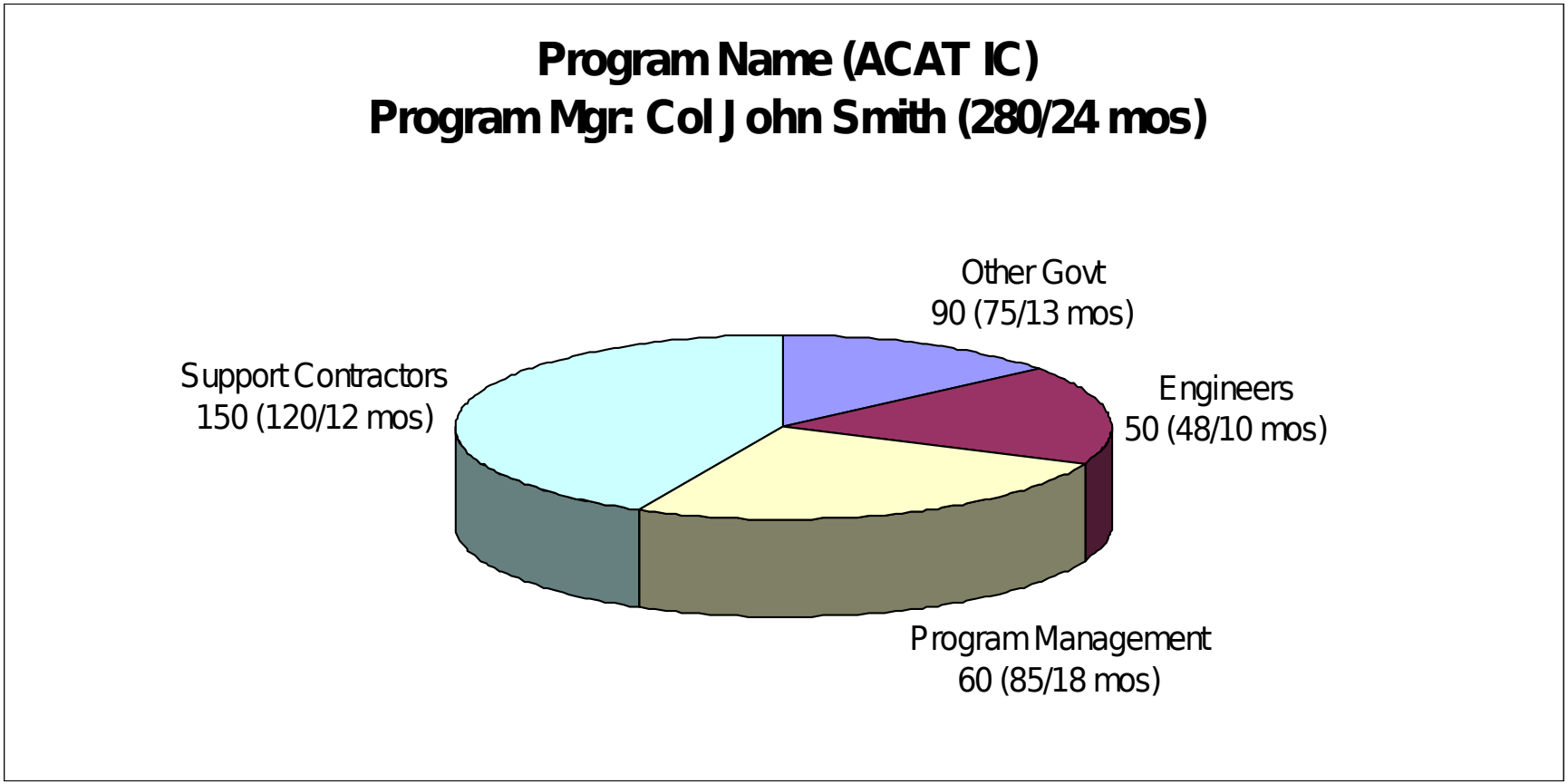
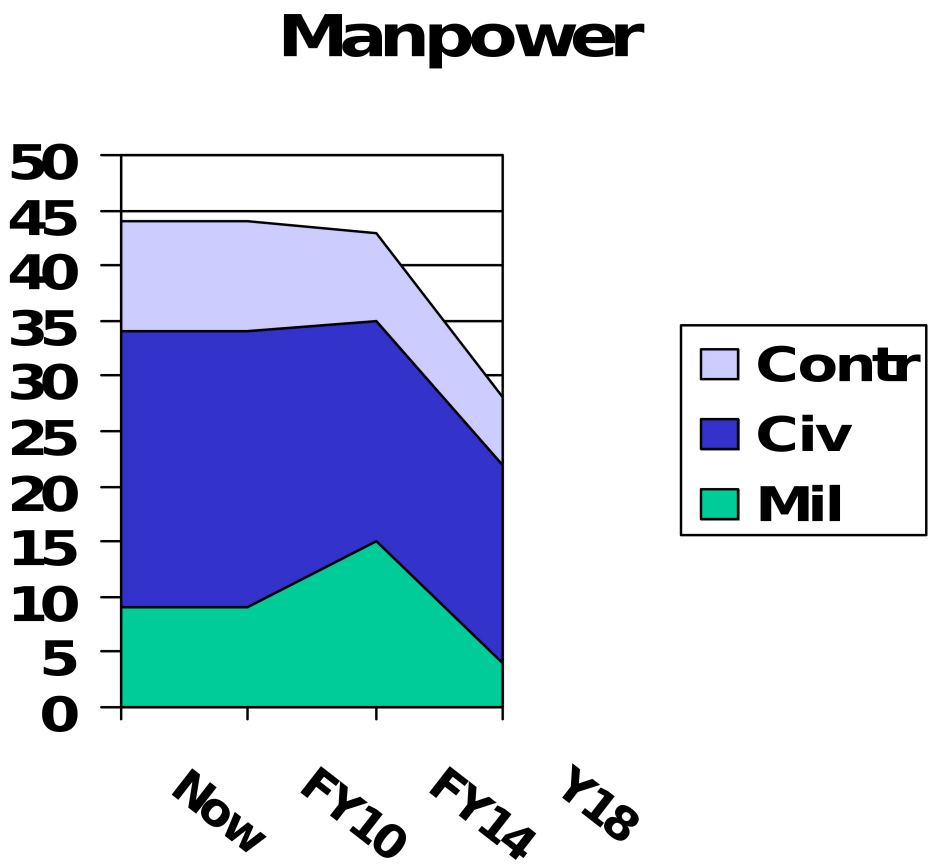
Mandatory

Program Office Experience Level



Manpower ramp up & down

- Current and Future Manpower level



Additional Acquisition Topics
(if not addressed elsewhere)

- Clinger Cohen Act Certification progress (CCA)
- Envir & Manuft/Quality Engineering
- Interoperability
- Information Assurance
- Information Technology
- Research/Technology Protection
  - *Protection of Critical Program Information*
  - Anti-Tamper
- Human Systems Integration
- Environment, Safety, Occupational Health
- Military Flight Operations QA
- Spectrum Management/Supportability
- Integrated Digital Environment Mgt
- Gov't Furnished Equipment/Property
- Modeling and Simulation
- Corrosion Control
- Insensitive Munitions
- Unique Identifiers
- Trusted Foundry

Status of Documents for MS Review

If you have to go to a MS Review

- **Show specific steps documents that need to be completed and reviewed and approved at HQs AF and at OSD. (I.e, documents, test events, etc)—**
- **(See Sample section for Matrix examples)**
  - **AoA**
  - **Capabilities Document**
  - **ISP**
  - **CARD/ICE—EA w/ ROI**
  - **TEMP**
  - **CCA compliance/certification**
  - **Systems Engineering documents (SEP, TRA, MRA)**
  - **Section 801 Certification (ACAT ID &IC programs)**
  - **Technology Development Strategy**

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"What Worries Me"

- **This is an opportunity to communicate internal concerns to the SAE**
- **Discuss any issues that are of a particular concern to the PEO and SPM (examples might be)**
  - **OSD Oversight issues**
  - **Funding instability**
  - **Technical transition issues**
- **Explain how you intend to track these areas specifically and report to the SAE any problems**

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Recommendation

- Approve Acquisition Strategy
- Approve applicable delegations
- Approve Waivers and Deviations
- Way ahead to AFRB/ARB and OSD DAB
  - Staff reviews/OIPT (PEO reviews)

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Final Thoughts in Preparing your Briefing

Some Items to Consider in Preparing Briefing – Feedback from Other Reviews

- **Contracts**
  - **Incentives**
    - Evenly provide the fee versus being back-loaded
    - Inadequate to control cost
    - Did not Focus on highest risk areas
- **Schedule**
  - **Insufficient detail; no critical path identified or briefer does not know**
  - **Briefer unable to explain schedule flow and margins for potential slips**
  - **Manpower ramp up & down does not match program schedule**
  - **SORAP does not align with program schedule…ensure AFMC involved early for sustainment funding**
- **Risk**
  - **Failure to adequately identify risk, or address mitigation plan once identified**
  - **PMs overly optimistic**
  - **Risk Mitigation inadequately addressed just indicating the SPO would work harder**
    - **“Working harder” is not a risk mitigation strategy**
- **Funding does not align with requirements or schedule**
  - **Need to present a fully funded program**
  - **Need to clearly identify costs by increment & map to budget documents**
  - **Small slip in contract award from end of FY A to beginning of FY B can mean loss of FY A funding**
  - **Be mindful that management reserve not used in the year of execution likely to be taken**

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SAMPLE CHARTS

Required Capabilities

Requirements Traceability

CDD	Capability	Sys Spec		Testing
KPP 1		Config Item 1		
		Config Item 2		
KPP 2				
Net Ready				
Materiel Availability	Materiel Reliability KSA Ownership Costs KSA			
Force Protection				
Survivability				
Training				
Energy Efficiency				
KSA 1				
KSA 2				

Use Multiple slides as

Alternative strategies considered

Alternative Acquisition Strategies Considered

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SAMPLE

- *The Challenge—Program Needs*
- **Develop a program plan that…**
  1) **Meets need date**
  2) **Migrates to ……architecture**
  3) **Satisfies the Net Ready KPP**
  4) **Utilizes existing equipment**
  5) **Maximizes insulation from other program risks**
  6) **Manages internal program constraints/dependencies**
     - **Other upgrades, computer processors, resources (labs & people)**
  7) **Best fits in a fiscally constrained environment**

Seven Key Items Used to Develop Strategy

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SAMPLE

Strategy 1

	Strategy 1
Maintains Strategic Connectivity Migrates	G
Satisfies Net Ready	R
Utilizes FAB-T	R
Insulation from other	R
Manage Constraints	G
Fits Fiscal Constraints	G
	G

1. Meets Need Date
2. Does not migrate
3. Does not fulfill Net Ready KPP
4. Uses existing equipment
5. No dependency on other programs
6. Manages constraints
7. No additional funding in near years

RED = No

YELLOW = Partially

GREEN = Yes

SAMPLE

Solution Trade Space

	Strategy 1	Strategy 2	Strategy 3	Strategy 4	Strategy 5
Maintains Strategic Connectivity Migrates	G	Y	G	R	R
Satisfies Net Ready	R	Y	G	Y	G
Utilizes Equipment	R	R	R	Y	G
Insulation from others	R	R	G	R	G
Manage Constraints	G	G	Y	G	R
Fits Fiscal Constraints	G	R	G	R	Y
	G	R	G	R	R

RED = No

YELLOW = Partially

GREEN = Yes

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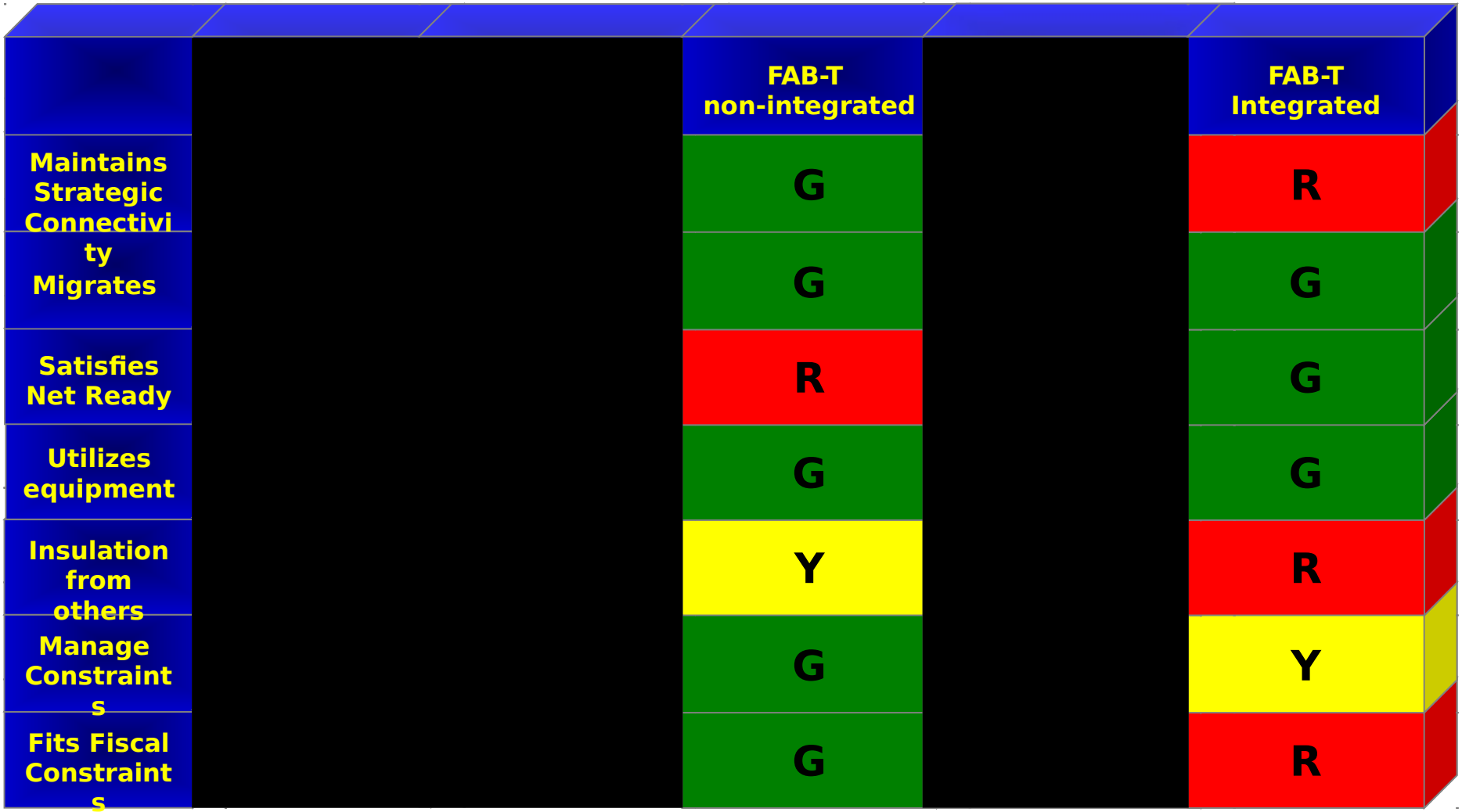
SAMPLE

Solution Trade Space



SAMPLE Acquisition Strategy Selected

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	Bridge Solution
Maintains Strategic Connectivity	G
Migrates B-2 to EHF	G
Satisfies Net Ready	G
Utilizes FAB-T	G
Insulation from AEHF	Y
Manage B-2 Constraints	G
Fits Fiscal Constraints	G

1. Meets Need Date
2. Migrates
3. Fulfills Net Ready KPP
4. Uses existing equipment
5. Minimal dependency on other programs
6. Manages constraints by…
7. No additional funding in near years

RED = No

YELLOW = Partially

GREEN = Yes

Documentation Samples

E.g.., MS B Document and Actions Status

Sample 1

Preparing Org	Program Documentation OPR	Approved By	Est Start Date (AF)	AF Status	Est Comp Date (AF)	Remarks
Program Management	Acquisition Decision Memo (ADM)	MDA				
	Acquisition Program Baseline (APB)	MDA				
	Acquisition Strategy Panel (ASP)	SAF/AQ				Completed
	Acquisition Strategy Report (ASR)	MDA				
	Expectation Management Agreement (EMA)					In coordination
	Information Assurance Strategy	SAF/XC				
	Life Cycle Management Plan (LCMP)					Draft in work
	Market Research Report	MDA				
	Milestone B Exit Criteria	MDA				
	Mission-critical and Mission-essential Information Systems Registration (MCESR)					
	Statement of Objectives (SOO)					
Systems Engineering	Systems Engineering Plan (SEP)	MDA				In work
	Tech Development Strategy (TDS)					
	Tech Readiness Assessment (TRA)					
Security	Program Protection Plan (PPP)	MDA				In work
	Security Classification Guide (SCG)					

= Prior to Start

= Being Drafted

= In Coord.

= Approved

MS C Documents and Actions

Sample 2

Status	Program Documentation	OPR	Approval Authority	Start	Complete	Actions
G	Consideration of Technology Issues					
G	Programmatic Environment, Safety and Health Evaluation (PESHE)					
G	Industrial Capabilities					
G	Independent Cost Estimate & Manpower Estimate					
G	Core Logistics Analysis & SORAP					
G	Technology Development Strategy		MDA			
G	Acquisition Program Baseline					
G	Cooperative Opportunities					

Approved On track--no issues

Issues but recoverable Significant issues, jeopardy

MS C Documents and Actions

Sample 2

Status	Program Documentation	OPR	Approval Authority	Start	Complete	Actions
G	Systems Engineering Plan (SEP)					
G	System Threat Assessment Report (STAR)					
G	Information Support Plan (ISP)		MDA			
G	Exit Criteria					
G	Cost Analysis Requirements Document (CARD)					
G	Capabilities Production Document (CPD)					
G	Affordability Assessment					
G	Test and Evaluation Master Plan (TEMP)					
G	Program Protection Plan (PPP)					
G	Acquisition Strategy/LCMP					
G	Operational Test Agency Report					
G	Acquisition Decision Memorandum (ADM)					
G	Technology Readiness Assessment (TRA)					
G	Earned Value Management System (EVMS)					
G	Unique Identification (UID)					

MS C Documents and Actions

Sample 2

Status	Program Documentation	OPR	Approval Authority	Start	Complete	Actions
G	**Expectations Management Agreement (EMA)**					
G	**Modular Open Systems Architecture (MOSA)**					

Approved **On track--no issues**

Issues but recoverable **Significant issues, jeopardy**

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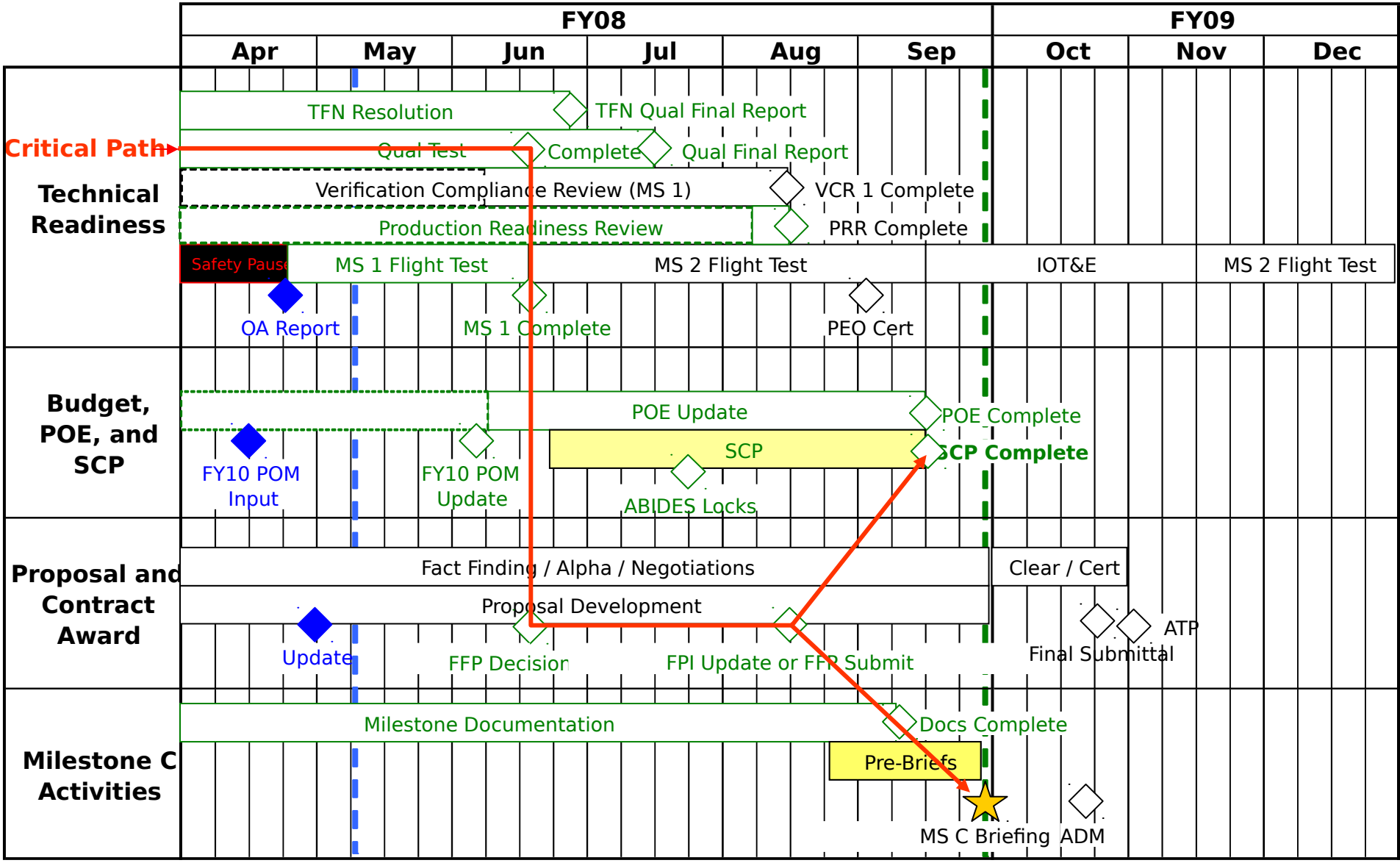
Other Samples

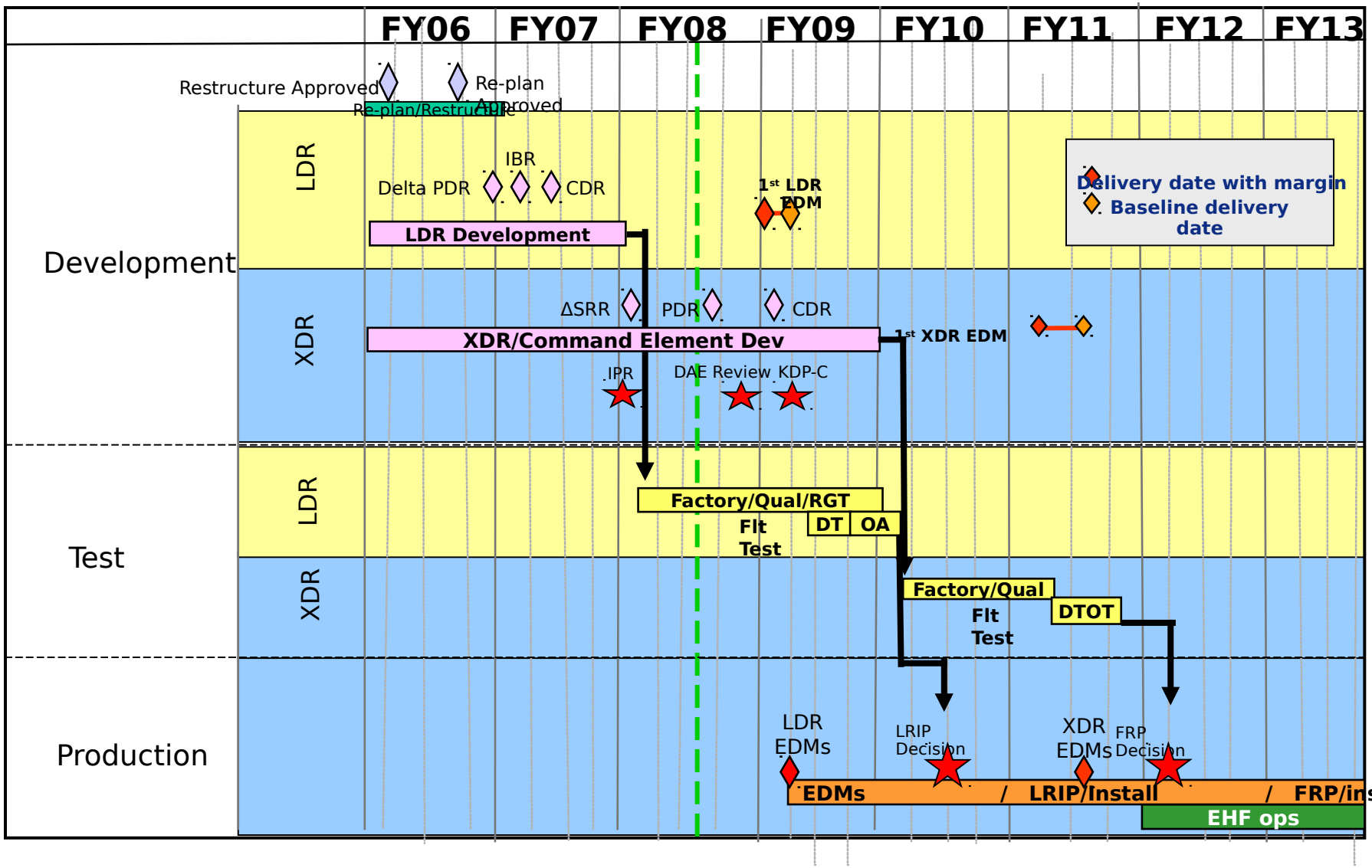
SAMPLE

Road to Milestone C



SAMPLE

Program Schedule



Human System Integration (HSI) & Environment, Safety, and Occupational Health (ESOH) Template *

Sample Chart

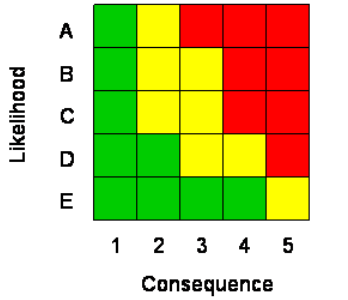
Systems Eng. Focus Areas	Compliance/Risk	Rationale/Comments
Manpower **		
Personnel **		
Training **		
Human Factors Engineering**		
Habitability**		
Survivability**		
Environment***		
Safety***		
Occupational Health***		

Legend:
* SAF/AQ Interest Item
** Use AF/SGR HSI Assessment Material
*** Use MIL-STD-882D

As Of: 30 Aug 06

Likelihood	Chance of Occurrence
A	Near Certainty 91 – 100%
B	Highly Likely 66 – 90%
C	Likely 36 – 65%
D	Not likely 11 – 35%
E	Remote 0 – 10%

Consequence	Description of Consequence
1	Negligible
2	Minor
3	Moderate
4	Serious
5	Critical



Sample Risk Matrix

Probability of Program Success Summary

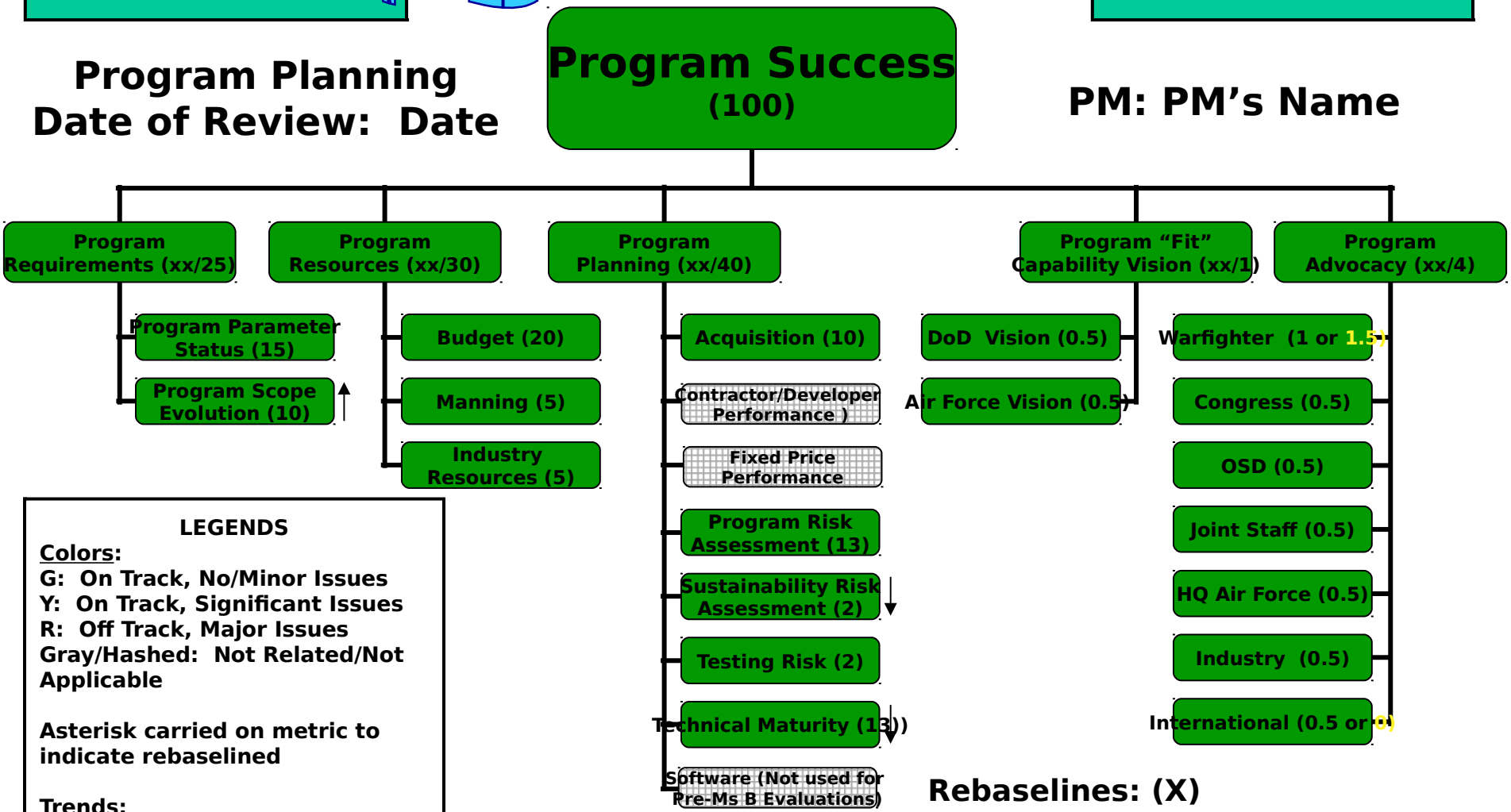
SAMPLE

PEO:

Program Name
ACAT XX

Program Planning
Date of Review: Date

PM: PM's Name



LEGENDS

Colors:
G: On Track, No/Minor Issues
Y: On Track, Significant Issues
R: Off Track, Major Issues
Gray/Hashed: Not Related/Not Applicable

Asterisk carried on metric to indicate rebaselined

Trends:
Up Arrow: Situation Improving
(number): Risk Score (based on 100 possible)
Down Arrow: Situation

Rebaselines: (X)
Last Rebaseline: DATE
Program Life Cycle Phase: XXXXXXX